

# The effective marketing and business development PA/Secretary

Beginners level

As firms manage costs, PAs and secretaries are required to take on an ever-increasing range of marketing and business development activities – and often these staff have no or little training in the subject. This half-day workshop covers the basics of marketing and business development in professional services firms and is designed for those who are either supporting fee-earners or departments who are active marketers or those working within a marketing or BD team.

## Topics covered

Why choose PM Forum training? See overleaf...

Whilst basic marketing theory is covered during the session, there is plenty of opportunity for participants to work with each other to share ideas and experiences about their roles and their firms and to apply the ideas that are learned.

- **Understanding the professions**
  - Culture – why marketing in the professions is different
  - History of marketing in the professions
  - Exploring marketing and business development roles:
    - Within marketing teams
    - Working for fee-earners
  - How different firms have adopted and deploy marketing
- **Basic marketing theory**
  - What is marketing? How is it different to selling?
  - What is strategy?
  - Common marketing/business development activities (the toolbox)
  - Links between brand, service and client care
  - The importance of client relationships
  - The shift from outbound to inbound marketing
- **Developing your role**
  - What does the marketing/business development department do?
  - How do fee-earners incorporate marketing and business development into their roles
  - Expanding your role and responsibilities
    - o Establishing information systems
    - o Research to support pitches and client meetings
    - o Supporting internal communications and media relations
    - o Manage the client and contact database
    - o Organise events and following up
    - o Managing the web and social media
    - o Help fee-earners

## Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit [www.pmforumglobal.com](http://www.pmforumglobal.com)



## Thursday 2 November 2017

This half-day workshop takes place from 9.30 to 13.00 starting with a light breakfast.

The workshop is aimed at secretaries, personal assistants and those with limited marketing knowledge. It is suitable for those who are joining the marketing team or who have a partner requiring more marketing support. It will also prove useful to those who are new to the professions.

**To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per firm**

## Trainer



**Kim Tasso** has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for PM magazine.

Further information at [www.kimtasso.com](http://www.kimtasso.com).

## Why PM Forum training?

Courses are designed and delivered by **qualified and experienced professionals** who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience in **learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in **Continuing Professional Development (CPD)**
- Dialogue can continue after training through members-only LinkedIn communities
- Only PM Forum members can attend events

## Venue

Travers Smith LLP  
10 Snow Hill  
London  
EC1A 2AL

## Fees

First attendee	£225 + VAT
Second attendee	£215 + VAT
All subsequent attendees	£205 + VAT

**Maximum of four attendees from the same firm.** Prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes: continental breakfast • mid-morning tea/coffee • folder of workshop material

## Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

## The effective marketing and BD PA/Secretary – 2 November

Name .....	Name .....	Name .....
Position .....	Position .....	Position .....
Firm .....	Type of firm .....	
Address .....		
..... Postcode .....		
Tel .....	E-mail .....	

Please enclose a cheque made payable to *Practice Management International LLP*  
or pay by Visa/Mastercard/Maestro/AmEx (*please circle one*)

Cardholder name: ..... Amount: £ .....

Card number: ..... Expiry date: ..... Security code: .....

Signed ..... Date .....

*Confirmation of booking will be sent by return along with a VAT receipt*

Please return this form to: **PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**  
**Tel: 020 7786 9786 training@pmint.co.uk www.pmforum.co.uk**

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